

388th Air Expeditionary Wing



U.S. AIR FORCE

**ORDERING
OFFICER
TRAINING**



Topics

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- **References**
- **Purchasing Officers**
- **Standards of Conduct**
- **Acquiring Supplies and Services**



References

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- **Federal Acquisition Regulation (FAR)**
- **Department of Defense Federal Acquisition Regulation Supplement (DFARS)**
- **DOD 5500.7-R, Joint Ethics Regulation**
- **DFAS-Directive Instruction Regulation 37-1, Finance & Accounting Policy Implementation**
- **Air Force Federal Acquisition Regulation Supplement (AFFARS)**
- **Defense Finance & Accounting Service, Paying Agent Standing Operating Procedures (29 Jan 01)**



Purchasing Officers

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- May be appointed only by HCA, or Chief of the Contracting Office
- Acts as an agent of the Contracting Officer
- Airman or DoD civilian who is authorized to purchase items valued less than \$2500 under the supervision of a contracting officer
- Allows unit representative to make small purchases while unit is deployed when merchant won't accept credit card
- Are authorized to obligate the U.S. Gov't funds up to the amounts and for the purposes specified in their appointment letters



Comparison

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- Ordering Officer
 - **NTE \$2500 per transaction**
 - **Specific authority**
 - **Periodic Recon**
 - **Vendor payment by Paying Agent with cash or check**
 - **Use SF 44**
- Credit Card Holder
 - **NTE \$2500 per transaction**
 - **General authority**
 - **Periodic Recon**
 - **Vendor paid immediately**
 - **GPC more widely accepted**



Standards of Conduct

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Avoid doing or appearing to do anything improper.

- **Accepting anything of value from a vendor doing business with the U.S. Gov (meals, baseball caps, coffee cups, etc.)**
- **Making purchases from a vendor with whom the Purchasing Officer has a financial interest**
- **Seeking private employment with a vendor from whom the Purchasing Officer is procuring supplies or services.**
- **Doing anything that might adversely affect the public's confidence in the Government's integrity**



Purchasing Officers Will NOT

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- **Make classified purchases**
- **Use purchase methods other than those authorized in their appointment letters**
- **Make purchases exceeding the dollar amount specified in their appointment letters**
- **Split requirements to avoid dollar limitations**
- **Purchase supplies or services for which a fixed price cannot be obtained before an order is issued.**



SELECTION

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- **Experience, training, education, business acumen, and ethics**
- **Time available to perform Purchasing Officer functions**
- **Must not be assigned conflicting duties (before or after appointment): F&AO, disbursing officers, paying agents, property book officers, accountable officers, AMSO, or CORs**



Training

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- ❖ **Commander selects trainees**
- ❖ **Commander requests training**
- ❖ **Contracting Officers conduct training**
- ❖ **Contracting Officers appoint ordering officers**
- ❖ **Contracting office keeps records**



Appointment

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- ❖ **CDR requests appointment for specific operations to buy specific items**
- ❖ **Contracting Officer appoints Purchasing Officer**
 - **for a specific command**
 - **for a specific period of time**
 - **to buy specific items (e.g.. expendable office supplies < \$50)**

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**ACQUIRING
SUPPLIES AND
SERVICES**



Purchasing

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- **The Paying Agent and Purchasing Officer must be present for all transactions**
- **The Purchasing Agent determines what goods to purchase**
- **Both are responsible for using the right color of money**
- **Purchases can not exceed the amount authorized and purpose**
- **The purchasing agent completes sections 1-14 of SF 44**
- **Paying agent completes sections 15-18th of SF 44**
- **SF 44 is completed, however, it can not exceed \$ 2,500.00**



Purchase Requests

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- **Purchasing Officer receives verbal or written requests to make purchases**
- **The Purchasing Officer or the requester writes description on the SF 44**
- **Use blank or lined paper if additional space is needed**



Purchase Requests (Continued)

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- **Have requester sign SF 44 if possible**

Note:

Requester must give Purchasing Officer enough information to buy the correct items

Preferred method is to have Requesting Activity complete the Form 9



Purchase Requests

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- **Description of item or service**
- **Quantity**
- **Estimated amount of purchase**
- **Required Delivery Date**
- **Authorized signatures**
- **Certified fund citation**
 - **Purchasing Officers may be issued bulk funds**



Funding Form

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- **Identifies requirements from requiring activity**
- **Gives Purchasing Officers the authority and funds to procure the specified supply or service**



Funding Purchases

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- **Purchasing Officers request funding from Finance Office**
- **Finance provides bulk funding on AF FORM 9 (Purchase Request)**



Funding Purchases (Continued)

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- **The amount on the Form 9 is the beginning balance in your “checking account”.**

Note:

The Paying Agent having cash does not mean
Purchasing Officer has funds remaining



Purchasing

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- **Authorized Purchases**
- **Unauthorized Purchases**
- **Fair & Reasonable Price**
- **Use of the SF 44**



Items Authorized To Be Purchased

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- **Specified in Letter of Appointment**
- **If not authorized, ask for authority**
- **If not sure, ask for authority**



Ex. Authorized Purchases (unless restricted)

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- **Appliances**
- **Construction Material**
- **Emergency Supplies**
- **Furniture**
- **Gravel**
- **Latrine & Shower Facilities**
- **Sanitation Items**



Ex. Authorized Purchases (unless restricted)

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- **Refuse Collection**
- **Repair of Info technology equipment**
- **Office machine repair**
- **Office equipment (not info tech)**
- **Laundry (if QM is not available)**
- **Training aids**



Unauthorized Purchases

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- **State and local taxes (contracting officer approval required)**
- **Ammo or explosives**
- **Personal Services**
- **MTO&E Equipment**
- **Info technology unless approved**
- **Intelligence information**



Unauthorized Purchases (Continued)

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- **Clothing**
- **Insurance**
- **Medical and dental treatment**
- **Passenger transportation on commercial carriers**
- **Personal comfort items**
- **Plaques, mementos, & training certificates**



Unauthorized Purchases (Continued)

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- **Rations and subsistence using OMA funds**
- **Advertisement in newspapers, magazines, or other media**
- **Printing services & related supplies & equipment**
- **Telephone & Utility bills**



Unauthorized Purchases (Continued)

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- **Construction**
- **Purchases over \$2500**
- **Purchases requiring more than one delivery or one payment**

Note:

Making unauthorized purchases can lead to termination, UCMJ, paying for items



UNAUTHORIZED COMMITMENTS (UAC)

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- **What is a UAC**
 - **Obligation on the part of an unauthorized individual**
 - **Purchases/Split Purchases exceeding \$2,500**
 - **Purchases exceeding amount of funding**
- **Could be violation of Federal Law**
- **Purchasing Agent could be held fiscally liable**



UNAUTHORIZED COMMITMENTS (UAC)

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- **Justification for Termination**
- **Requires ratification (painful process)**



Fair & Reasonable Price

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- **Purchasing Officer responsible**
- **Competition not necessary. Recommend getting quotes from a minimum of three vendors**
- **Market or product knowledge**
- **Rotate vendors even if purchase is not the lowest price**



Paying For A Purchase

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Paying Agent pays cash

or

**Vendor gets check from
Finance Office**

****Expenditures will be documented in U.S. dollars. Purchases made in foreign currency must be converted at the appropriate rate**

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**SF 44
Orientation**



CONDITIONS FOR USE

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- **Amount of purchase is \$2,500 or less**
- **No other authorized method of purchase is more suitable**
- **Supplies or services are available immediately**
- **Only one delivery and one payment will be made**



SF 44

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- **Purchase Order Invoice Voucher**
- **All purchases are made on the SF 44**
- **Original copy is maintained by the Paying Agent**
- **Purchase Register**
- **PIIN assigned to each order**



SF 44 (cont.)

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- If foreign currency, record rate at which currency was purchased
- Use SF 44 to account for any expenditure of money
- Receiver may be the paying agent or a third party, not the purchasing/ordering officer
- Safeguard SF 44's once filled out they are worth the equivalent of cash



U.S. GOVERNMENT
PURCHASE ORDER-INVOICE-VOUCHER

DATE OF ORDER Date Prepared	ORDER NO. MS-OO#-Serial #
PRINT NAME AND ADDRESS OF SELLER (Number, Street, City, and State) Seller's Name Seller's Address	

FURNISH SUPPLIES OR SERVICES TO (Name and Address)
Name and Address of TF or Operation

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All
amounts in
local
currency

SUPPLIES OR SERVICES	QUANTITY	UNIT PRICE	AMOUNT
List of all items ordered	QTY	Unit\$	Total
Use continuation sheet if necessary			
Exchange Rate			
Local \$\$=1			
US\$			

AGENCY NAME AND BILLING ADDRESS DFAS-OR/FPV PO Box 934400 2500 Leahy Avenue Orlando, FL 32893-4400	TOTAL in US\$ DISCOUNT TERMS If applicable DATE INVOICE RECEIVED NA
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ORDERED BY (Signature and title)
Signature and Title of Ordering Officer

PURPOSE AND ACCOUNTING DATA
From Block 19 of PR&C

PURCHASER to sign below for over-the-counter delivery of items
RECEIVED BY **Signature and Receiving Officer (may be the paying agent)**

TITLE **Title of Receiving Officer** DATE **Date Rec'd**

SELLER Please read instructions on Copy 2
☒ PAYMENT RECEIVED \$ ☐ PAYMENT REQUESTED \$

NO FURTHER INVOICE NEED BE SUBMITTED
SELLER BY **Vendor's Signature** DATE **Date**

I certify that this account is correct and proper amount of \$
DIFFERENCES
ACCOUNT VERIFIED:
CORRECT FOR
BY

PAID BY ☐ CASH DATE PAID VOUCHER NO.
OR ☐ (Check No.)

* PLEASE INCLUDE ZIP CODE 1. SELLER'S INVOICE STANDARD FORM 44a (Rev. 10-83)
PRESCRIBED BY GSA,
FAR (48 CFR) 53.213(c)

(See instructions on Copy 2)

Always get a
receipt of invoice
indicating
payment has
been made

Amount in
local
currency

Attempt to
get
Vendor's
Signature



Tracking Funds

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- **Use the “Record of Purchases” on the SF 44 book divider**
- **Record the following entries:**
 - **Order No.**
 - **Name of Contractor**
 - **Date of Purchase**
 - **Amount**



Distribution Of The SF 44

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- **Copy 1 (White) to Paying Agent. (If paid by check, Purchasing Officer submits to Finance). Original cash register receipt or invoice goes with copy.**
- **Copy 2 (Blue) given to vendor at time of purchase**



Distribution Of The SF 44

(Continued)

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- **Copy 3 (Pink) document receipt of supply / service, submit to contracting office.**
- **Copy 4 (Green) Retained by Purchasing Officer in SF 44 Book. Staple copy of cash register receipt or invoice to copy.**

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**REPORTS
&
FILES**



Reports

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- **Submit copies of all purchase receipts, and copies 3 and 4 of the SF 44s to the Contracting Officer as directed in Letter of Appointment**
- **Complete 1057 Feeder report to Contracting Officer as directed in Letter of Appointment**



DD Form 1057

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- **Monthly Feeder Report**
- **Due monthly to contracting activity**
- **Specifies total number of transactions and dollar amounts for the month**



Files

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- **Copy of appointment letter**
- **Original of each Form 9 or other authorization received**
- **Signed copy of each purchase document issued**
- **Documentation of annual Joint Ethics Regulation training**



Files

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- **Other info to document performance of duties (MFRs, etc.)**
- **Copy of all contracting officer reviews**



Termination

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- Clearance
 - **Account for all SF 44s and funds**
 - **Clear before departing area of operation**
- Termination **ends appointment**
 - **At the request of the commander**
 - **At the end of the appointment period**
 - **For making unauthorized purchases**
 - **Unsatisfactory performance or misconduct**

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CONCLUSION

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QUESTIONS ?????